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RFP-AFI-2026-02

Request for Proposal

Provision of Professional Consultancy Services for Technical Support to the AFI Member Needs Assessment 2026

Data	Specific Instructions / Requirements
RFP Issuance Date	20 January 2026
Proposal Submission Deadline	30 January 2026, 9:00AM (GMT)
Notification of Award Decision	March 2026
AFI Contact Details (submitting questions & proposal)	Procurement & Contracts Office E-mail address dedicated for this purpose: RFP2602@afi-global.org

Alliance for Financial Inclusion

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1. Background:

The Alliance for Financial Inclusion

The Alliance for Financial Inclusion ([AFI](#)) is the world's leading organization on financial inclusion policy and regulation. Currently, 90 member institutions make up the AFI network including central banks, ministries of finance and other financial policymaking or regulatory institutions from over 84 developing countries and emerging markets. AFI empowers policymakers to increase the access and usage of quality financial services for the underserved through sustainable and inclusive policies and an effective use of digital technologies.

Policies developed and implemented by AFI members contribute to a range of the [Sustainable Development Goals](#). By Setting their own agenda, AFI members harness the power of peer learning to develop practical and tested policy reforms that enhance financial inclusion with strategic support from both public and private sector partners.

AFI has 7 [Working Groups](#) (WG): Consumer Empowerment and Market Conduct Working Group ([CEMCWG](#)), Digital Financial Services Working Group ([DFSWG](#)), Financial Inclusion Data Working Group ([FIDWG](#)), Financial Inclusion Strategy Peer Learning Group ([FISPLG](#)), Global Standards Proportionality Working Group ([GSPWG](#)), Inclusive Green Finance Working Group ([IGFWG](#)) and SME Finance Working Group ([SMEFWG](#)),

As the key source of policy developments and trends in financial inclusion and as the primary mechanism for generating and incubating technical content in the network, the Working Groups serve as "communities of practice". Providing a platform for knowledge exchange and peer learning among policymakers to share, deliberate and deepen their understanding, the working groups offer leadership and expertise in their respective policy fields and support the network to monitor new developments in emerging fields.

The knowledge generated via the working groups is disseminated for implementation by a range of [capacity building activities](#) such as Joint Learning Programs, Member Trainings, Trainings by Private Sector Partners. The practical experience members garner from engaging in peer learning based capacity building is then applied by members as [in country implementation](#) projects which are supported by the provision of financial or technical support to AFI member institutions in conducting activities that aim to deliver financial inclusion policies, regulations, supervisory tools or enablers for the development of policies, such as national financial inclusion strategies.

The working groups receive strategic guidance and insight from the High-Level [Global Standards & Policy Committee](#), while the [Gender Inclusive Finance Committee](#), supports WGs in integrating gender considerations into all aspects of their work and support members in fulfilling their [Denarau Action Plan \(updated 2022\)](#) commitment to promote women's financial inclusion.

AFI members have made further commitments in a range of other accords which can be read [here](#).

The AFI's five regional initiatives complete the AFI platform of services by supporting policy implementation in Africa ([AfPI](#)), Latin America and the Caribbean ([FILAC](#)), the Pacific Islands ([PIRI](#)), Eastern Europe and Central Asia ([ECAPI](#)) South Asia Region ([SARFII](#)) and the Arab Region ([ARFIPI](#)).

2. Project Background:

As a member-driven organization, AFI continuously builds its customer orientation, being responsive and flexible to best cater to its members' needs and expectations.

To do so, AFI conducts an annual Member Needs Assessment (MNA) survey to assess its members' awareness, usage and satisfaction of its services. Additionally, this is also used to gauge members' future priorities and guides AFI's decisions about services and thematic areas to focus on.

AFI is seeking the services of a market research organization (MRO) or consultant to provide technical support in undertaking the MNA survey.

3. Overall Objective:

The 2026 Member Needs Assessment will be built upon and be compared to the results of previous surveys from the year 2014 to 2025. Specifically, the 2026 edition will draw patterns and trends regarding members' needs and AFI's performance by comparing data from the previous two (2) editions which are year 2025 and 2024 of the Member Needs Assessment.

The MNA will cover up to 90 developing and emerging member countries worldwide, with up to 500 potential respondents. The survey will have 2 separate questionnaires, one for heads of institutions and another for technical-level staff.

The assessment will be an online self-administered survey in three languages: English, Spanish and French, questionnaires to be provided by AFI. AFI will be responsible for contacting members to participate in the MNA.

4. Scope of Work:

The primary objective of the assignment is to provide technical support in data collection, analysis and report writing of the MNA. Specifically, the tasks include:

- Review draft questionnaires (developed by AFI) and provide inputs (e.g. branch logic, phrasing of questions, question type, etc.) in line with best practices - for both Technical and High-Level
- Upload the questionnaires (English, Spanish and French) to a web platform and generate unique links for both questionnaires for distribution by AFI

- Undertake data analysis including year-on-year comparison (from year 2024 onwards)
- Develop reports and provide key recommendations against assessment’s objective

5. Timeline and Deliverables:

The assignment is expected to begin on 30 March 2026 and end on 28 August 2026. The key deliverables and timeline are as below:

No.	Deliverables/Activities	Tentative Dates
1.	Consultancy assignment kick-off and submission of technical research proposal outlining survey design and methodology (including workplan and timeline)	30 March 2026
2.	Scripting of questionnaires (both technical and high level, both in English, Spanish and French) onto online survey platform	To be proposed by vendor during RFP submission
	Data collection / field work	To be proposed by vendor during RFP submission
	Data cleaning and tabulation	To be proposed by vendor during RFP submission
3.	Submission of raw data and formatted dataset	5 June 2026
4.	Analysis and development of draft report in Word or PowerPoint format	30 June 2026
5.	Submission of final report with recommendations in Word or PowerPoint format	28 August 2026

6. Travel:

No Travel is expected for this assignment. The consultant(s) will work remotely and undertake virtual meetings to complete the tasks.

7. Consultant Experience:

The following qualifications are **mandatory** for the MRO project team:

- **Relevant academic qualifications:** Advanced degree in statistics, market research and analysis, data science, behavioural economics or other related field.
- **Experience in undertaking market research:** More than 8 years of professional experience in undertaking market research at global and/or regional level; demonstrated familiarity with member/consumer satisfaction surveys, organization branding, etc. are desired.
- **Experience in quantitative research methods:** Experience in undertaking quantitative research is required; knowledge in statistical software (e.g. SPSS) and/or Microsoft Excel is necessary; qualitative research skills are desired.

- **Experience with global and/or regional membership-based organization:** Prior experience working with membership-based organization on satisfaction and/or needs surveys is desired; engagement with financial regulatory entities particularly in developing countries would be an advantage.
- **Ease of use of survey portal:** Data collection tool with user-friendly user interface, customizable for organization branding, and multi-lingual capability.
- **Language and report writing skills:** Fluency in English (oral and written).

8. Reporting:

During the period of the execution of project, consultant will be expected to provide regular reports and updates to AFI's Monitoring and Evaluation department and is expected to provide regular progress updates (either in writing or virtual meetings).

The workplan submitted by the consultant(s) along with the evaluation matrix will be used for the monitoring and supervision of the progress of this assignment.

9. Payment Terms:

The payment terms/schedule proposed for this consultancy are as following:

No.	Deliverables	Percentage
1.	<ul style="list-style-type: none"> • Upon submission and acceptance of technical research proposal outlining survey design and methodology (including workplan and timeline) • Upon scripting of questionnaires (both technical and high level, both in English, Spanish and French) onto online survey platform 	40%
2.	<ul style="list-style-type: none"> • Upon submission and acceptance of draft report with key findings and recommendations in Word or PowerPoint format 	40%
3.	<ul style="list-style-type: none"> • Upon submission and acceptance of final report with recommendations in Word or PowerPoint format 	20%
	Total	100%

10. Administrative Information:

10.1 Disclaimer

The final decision on selection of a firm for this project rests with AFI management team and with the Inquiry. Only shortlisted and successful firms will be contacted.

10.2 Proposal Submission Information:

Proposals will be due with the following requirements for submission:

Submission Deadline:	30 January 2026, 9:00AM (GMT)
Documents to be submitted with Annexure 1 and 2:	
Firm	<ul style="list-style-type: none"> • Company Registration; • Company Profile; • List of previous or current clientele on similar work; • Workplan (graph/timeline) • References with email contact; • Joint-Agreement (if any); • Conflict of Interest Disclosure form; • At least one (1) sample work (link or attachments) if any
Method of Submission:	By email to AFI's Procurement & Contracts Office at RFP2602@afi-global.org
Submission of Technical and Financial:	<p>Kindly submit the followings:</p> <ol style="list-style-type: none"> 1. Using the template/format given in Annexure 1 (Technical) and Annexure 2 (Financial) and/or additional technical proposal for more information. 2. Technical and Financial proposal must be separated in different pdf. 3. Financial proposals must be USD only. Whereas for Malaysian applicants with Business Registration under Suruhanjaya Syarikat Malaysia (SSM), please submit your financial proposals in MYR. 4. Proposal to be submitted to the designated email address. 5. AFI does not tolerate copyright infringement, including but not limited to infringement, in the form of plagiarism. Consultant or Consulting entity awarded a contract by AFI shall take responsibility to ensure that the authored works, produced in parts or as an entirety of the deliverables stated in this RFP does not infringe on copyrights.
<p>AFI is not bound to accept the lowest quoted bid and reserves the right to disqualify incomplete submission, overlapping submission, non-compliance to the above requirements. Notification of results will only be sent to shortlisted candidates upon completion.</p>	

10.3 Retention of Proposals

All proposals submitted become the property of AFI. AFI will make all reasonable efforts to maintain proposals in confidence and will release proposals only to personnel involved with the evaluation of the project. Proprietary information should be identified in each proposal.

11. Evaluation Criteria

The proposals submitted will be evaluated based on the following criteria:

No.	Technical Scoring Criteria	Percentage
1.	Profile and Overall Qualification	25%
	Profile of firm and/or individual	10%
	Demonstrated understanding of the scope of work	10%
	Sample work in English	5%
2.	Technical Experience	60%
	Experience in conducting market research; research skills, especially quantitative research and data analysis	20%
	Survey portal - user friendliness of user interface, customizable for organization branding, multi-lingual capability, etc.	40%
3.	Adequacy of proposed workplan and methodology	15%
	Technical approach and research methodology	10%
	Workplan	5%
	Total	100%

Evaluation of technical and financial proposals

AFI reserves the right to award the most suitable proposal based on the evaluation of combined criterion, where bidders are qualified by the combined valuation of the technical and financial proposals, with the following weightage:

- i) Technical Proposal: 70% (Seventy percent)
- ii) Financial Proposal: 30% (Thirty percent)